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Growing a tech stack to reach $1B in AUM: Show Me Your Stack
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Welcome to "Show Me Your Stack," a series from Financial Planning in which we interview those who deliver financial advice to learn what tools they rely on to make it happen. Rising client expectations are driving the need for more powerful tech tools, and we're digging deep to find out why advisors prefer certain solutions.

If you ask Triad Wealth Partners' chief technology officer Quin Kilgore what its assets under management (AUM) number is, you might hear two different answers.

The Lawrence, Kansas-based firm currently has 14 advisors and $460 million in AUM. However, Kilgore said the firm is on "a trajectory to reach $1 billion in AUM by the end of the year."

Kilgore, who joined the firm last month, has a long history on the technology side of wealth management, having previously spent 11 years at the Omaha, Nebraska-based Carson Group, where he was responsible for expanding the company's technology infrastructure.

"I was one of the early employees there," he said. "So, I got to grow the tech stack up from basically nothing."

Before that, Kilgore spent three years at Orion Advisor Services, first as an account manager and later as a strategic service team manager.

As part of the effort to more than double the size of Triad Wealth Partners' AUM in the next eight months, Kilgore plans to leverage artificial intelligence tools.

"We're definitely keeping an eye on it, without trying to over-commit by any means," said Kilgore.

Kilgore said Triad will begin the process of building its own AI-powered engine on top of its coaching and training content.

"You can do real-time large language model (LLM)-type of chats, asking questions, the way you would think of a question, and surface the right training and coaching for what you're trying to pull off of that," he said.

The system will also use meeting notes to coach advisors, helping them grow, address key topics and learn how to deal with client concerns, Kilgore said.

"The other piece that we're building, behind the scenes and mostly from scratch, is what we're considering an advisor workstation," Kilgore said. This "big build" will connect financial planning tools to the CRM and pull in AI meeting notes. "Instead of integrating directly into the CRM, we're going to have it take it to the advisor workstation and start the execution of whatever workflow that you have talked about with that client — whether that be a rebalance or opening a new account or maybe taking a distribution."

Scroll down the slideshow to see what Kilgore feels are some of the most important pieces of Triad Wealth Partners' tech stack.

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CRM: Salesforce Financial Services Cloud
"I'm pretty familiar with all the back-end components. That's why Salesforce is so successful right there: You can customize it to the nth degree. With that, though, you can get lost in the sauce too, and over-customize your CRM.

"I think with all the new technologies that are coming out lately, there's going to be less reliance upon a CRM and more reliance on AI note-taking tools and things like that that will capture a lot of this unstructured data that used to live within a CRM. So we could get back to the days of just business card-type demographic information that lives in a CRM."

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AI note-taking: Zocks
"The nice part about Zocks is a lot of [our advisors are] already signed up for it, because you can just go out to the website and sign up. But we're going to roll them into our enterprise agreement and build out some templates based on our Triad best practices from a coaching perspective on how to run meetings.

"We're making sure that we collect the right information, depending on what style of client they are. So we're pretty pumped about that. What I'm personally most pumped about, though, is the next step after the note-taking: Going to execute those action items."

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Reporting: Orion
"It's funny how many people work at Triad that can trace back to either having worked at Orion or been on Orion for more than 10 years. So we have a ton of experience on our team with all the intricacies of Orion, from composite reporting down to how we run our bills every quarter."